

# Strategic Vision Regular Work Sessions, Start Early

November 4 Past Strategies & Current Conditions

Financial Update John Campbell

November 18 Infrastructure & Environment Ryan McReynolds

Safety & Security Chief Dye, Chief Quillin

December 2 Jobs & Economy Tim Whaley/NETWORKS

Neighborhoods, Housing & Development Lynn Tully

Higher Education, Arts & Culture

Leisure & Transit

January-February 2014 - Staff utilizes input from BMA to finalize comprehensive strategic vision for presentation back to full BMA

Morris Baker

Chris McCartt



"A community's progress should be measured in quarter centuries, not quarters"

Title: Moose Lodge

Description: Exterior of the Moose Lodge.

Photographer: Thomas McNeer, Jr.

Date of Image: 1962

1962



2010

### Suggested themes...

- Focus on the big picture
  - Progress should measured in quarter centuries, not quarters
- Good to great
  - Kingsport has already accomplished many good things, what would make our city great?
- Not too hot, not too cold, just right
  - What is the ideal size of a city?
  - At what point is our city the "right size"?
  - What can we reasonably do to influence growth (or not)?
- Great neighborhoods, smart growth
  - How do you define "smart growth"? Sustainability? Redevelopment?
  - How do we become the preferred city of the region?

### Outline

- Review past visioning efforts
- Discuss the geography
- Scanning the environment
  - Who lives here?
  - Who's moving here?
  - Housing
  - Educational Attainment
  - Income
  - Employment
  - Retail
- What should we start/stop doing?

Our city will change.

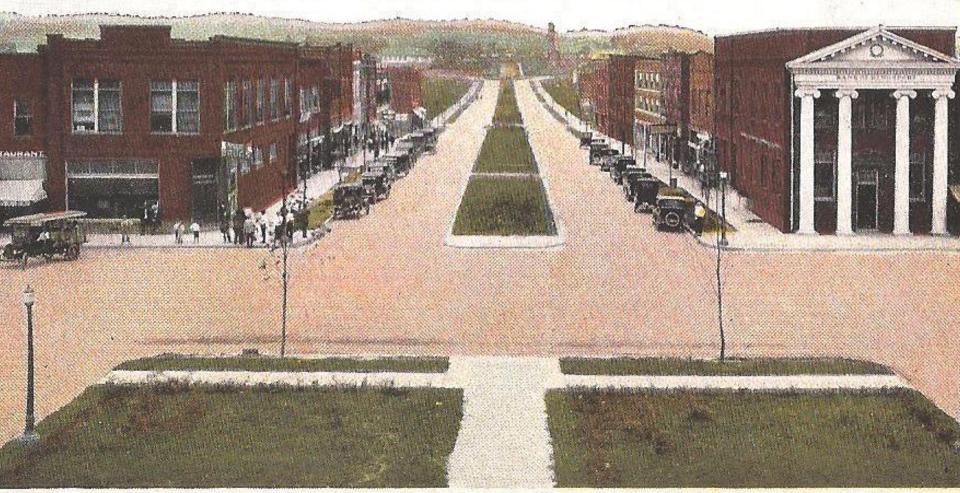
How will it change on our watch?

Today's policies will shape tomorrow's city.

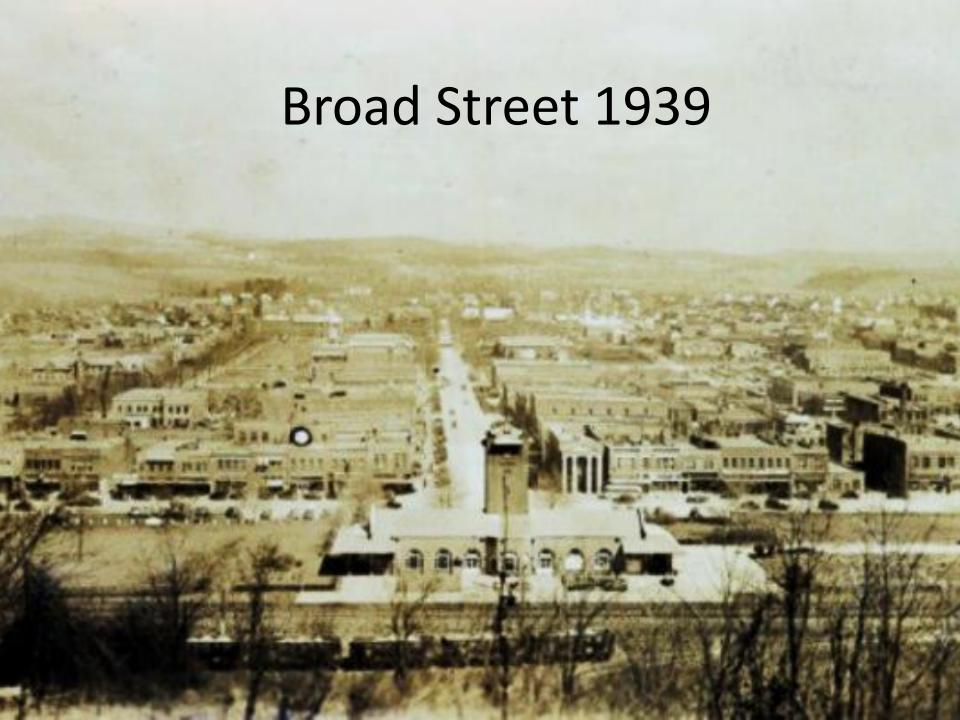
Let's review some of the past imagery.



### **Broad Street 1920s**



BROAD ST., LOOKING NORTHEAST FROM C. C. & O. R. R. STATION, KINGSPORT, TENN.





### **Broad Street 1950s**



## Broad Street 1970s/80s

- Downtowner Motor Lodge
- Lowe's in front of Train Station
- "Kingsport Centre" Basler/Cason
- Homestead Hotel
- Foundry
- Press train tracks in Clinchfield St









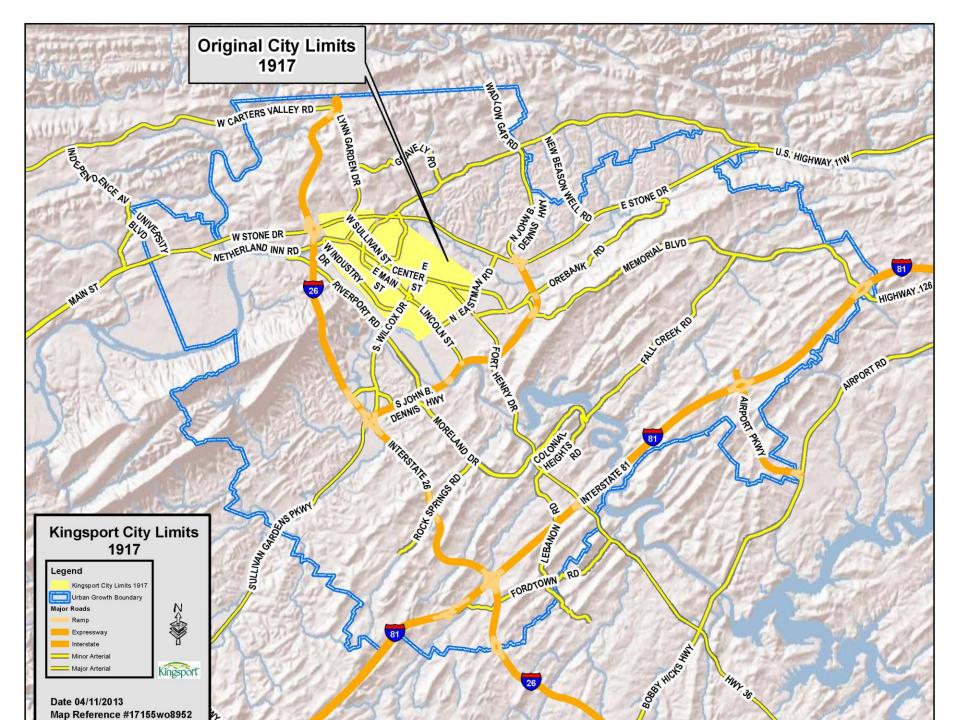


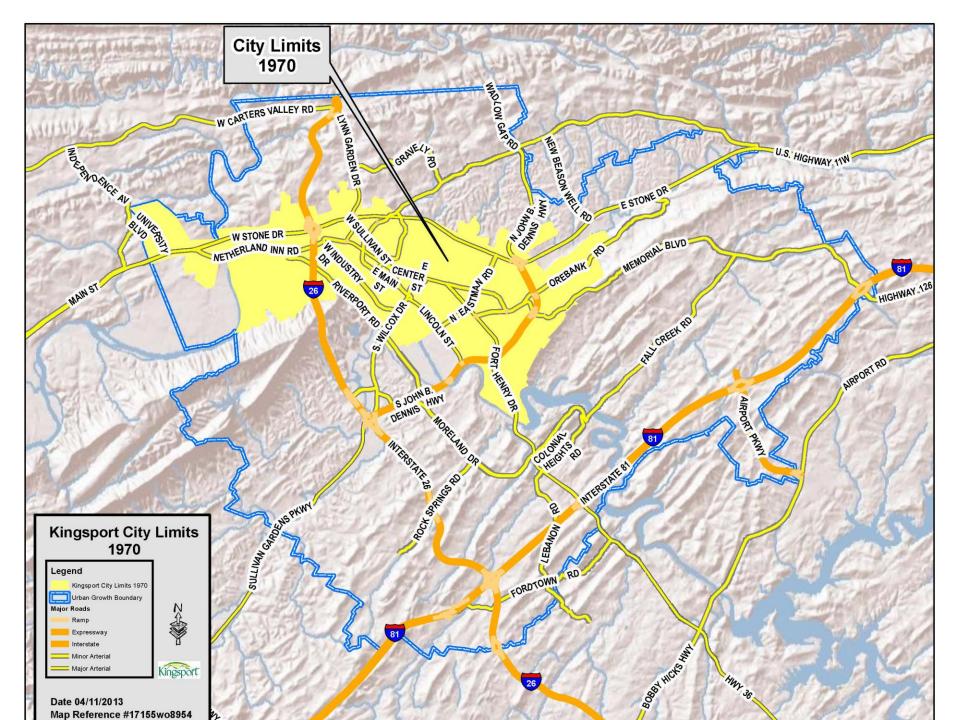
### **Broad Street 2013**

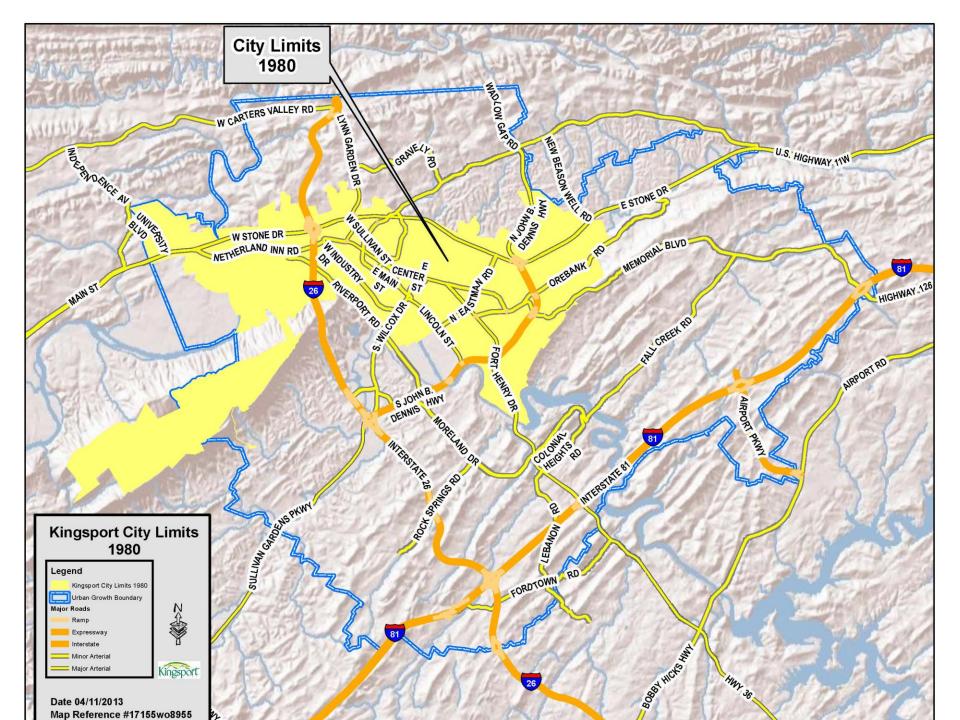


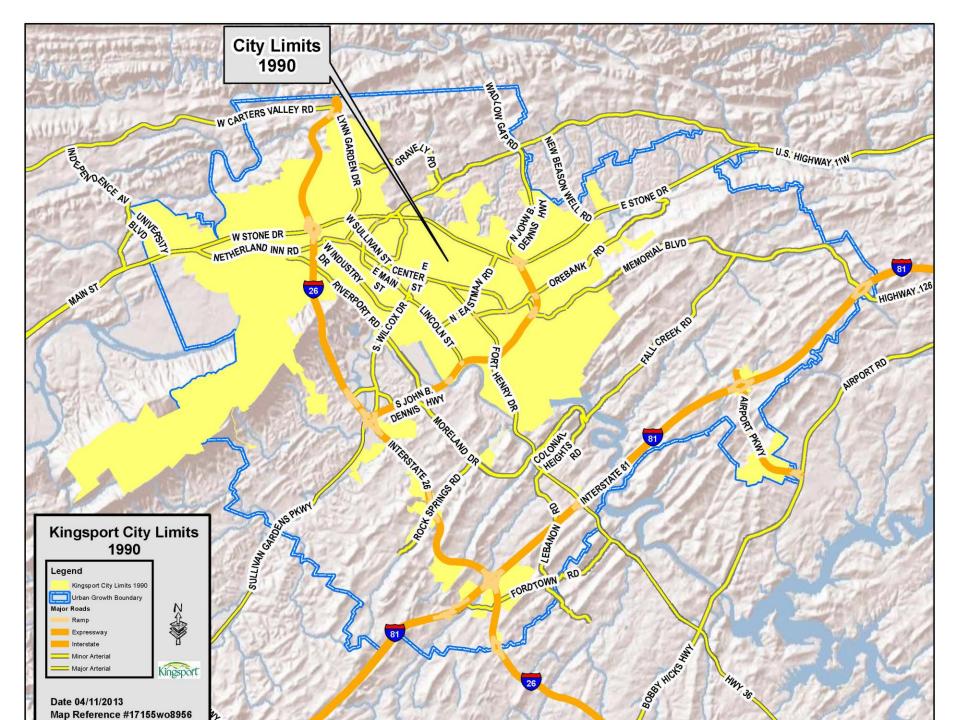


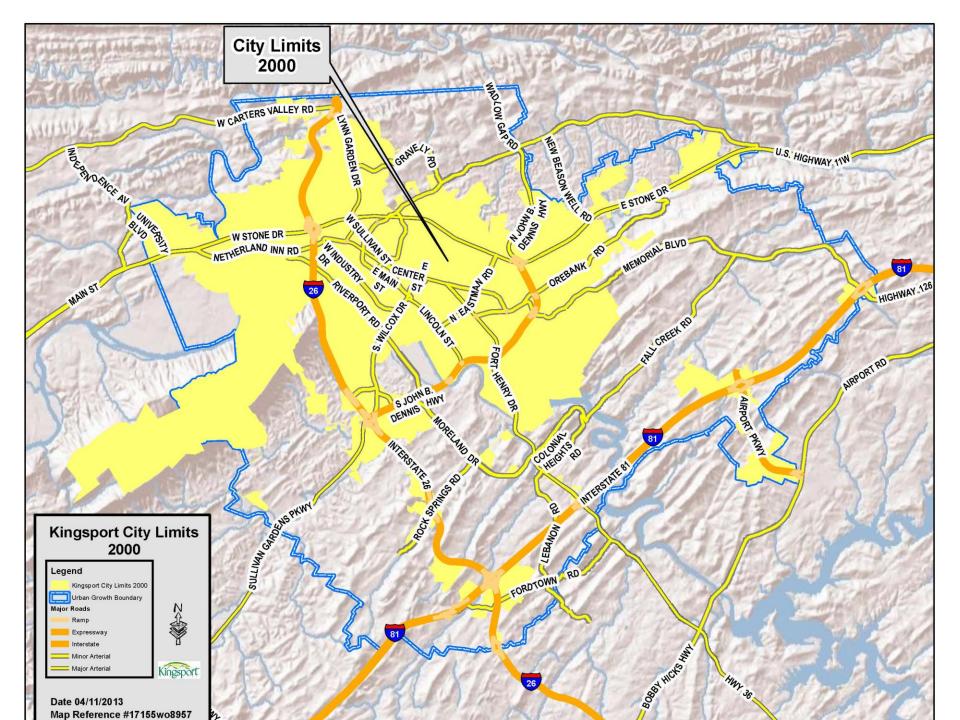
Geography: How has our city changed?

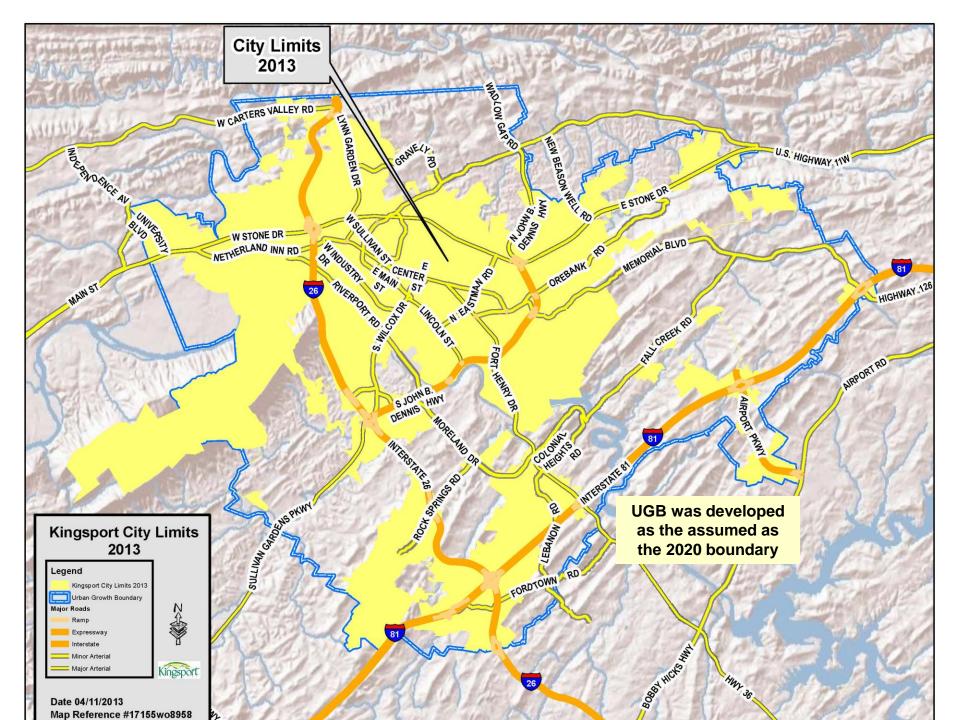












# Let's take a look at some of Kingsport's previous strategic visioning

## 1967 Vision for 2017

KINGSPORT TIMES-NEWS

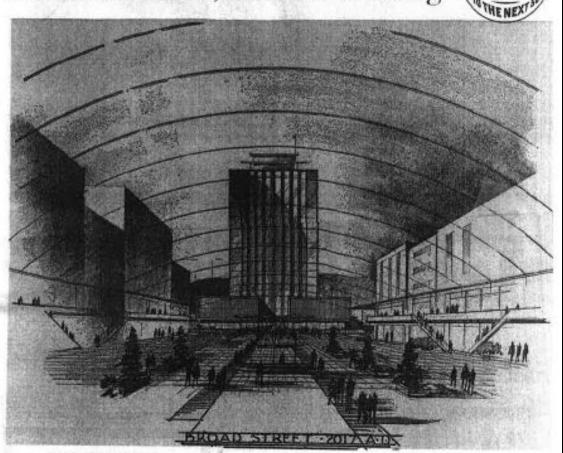


ANNIVERSARY EDITION



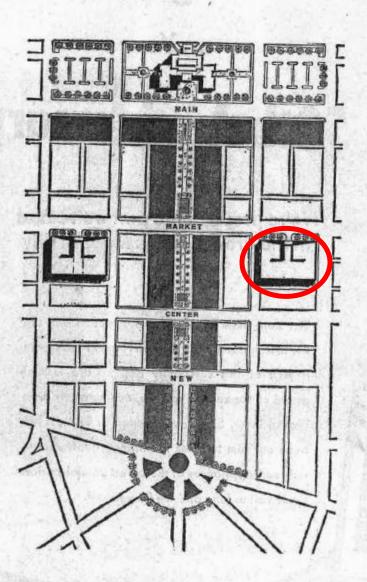
Broad Street, 50 Years From Now: Air Conditioned, And No Cruising





#### STREET SOLVAD

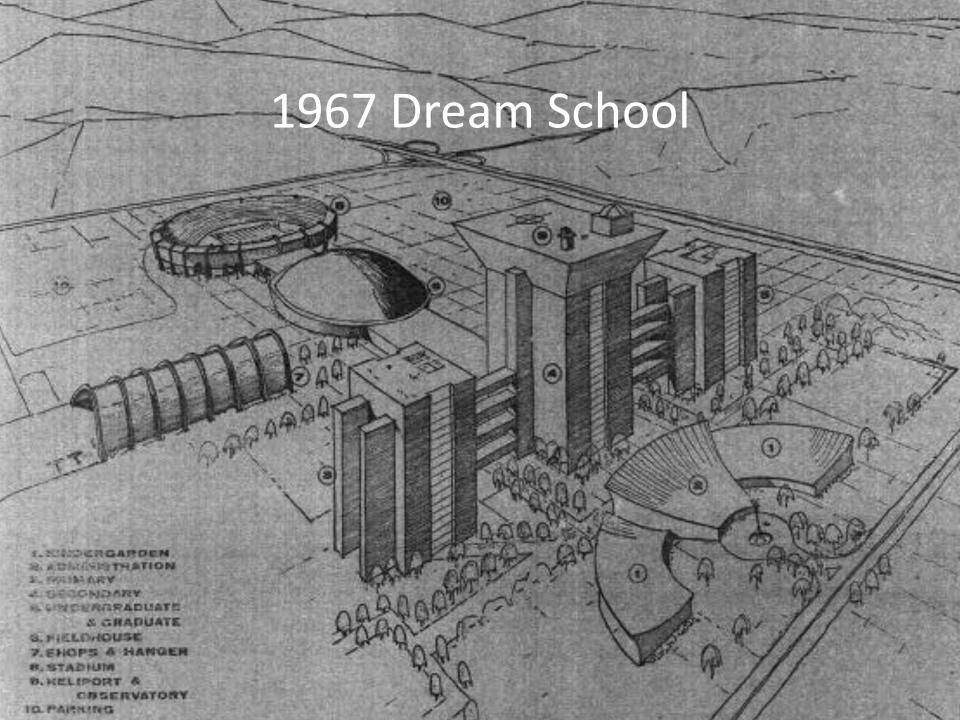
# 1967 Vision for 2017



Broad Street is completely enclosed in a plastic dome in architect's sketch. Instead of cruising, pedestrians move along conveyor belts, rising to second story level on escalators. Large buildings at left and right in site plan are parking garages. The tower rises a very old Clinchfield Railroad station.

to the ravages of chemically laden atmosphere, changes temperature, or effects of inclement weather. Similarly a floor, either interior or exterior, can be so treated. In conjunction with these cocoon-like finishes the lumber industry has introduced treatments of wood which produce completely waterproof and weatherproof plywood sheets and solid and laminated structural members. Today's sheet of waterproof plywood can be left out in the weather without even a coat of protective paint and after years of such exposure will deterioration whatever.

Mechanical devices and controls have been developed which can program and carry out all the multi-complex mechanical functions required in a large building or a massive group of buildings. Not only are all mechanical functions:



## 1976 Vision



ner here Photo - borr carter



## Shape Of Things To Come Downtown?

Desenters Kingsport in the next few years could leek this, if local architects and ever lookers can sell their dream to centercity propertyeveness who may be laxed extra to make it a reality.

The plan, sponsored by the Downtown Kingsport Association and public Tuesday evening, calls for

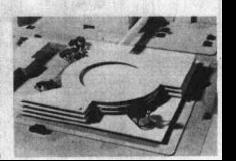
-Top, a Bester high-rise professional building, which would dominate the new Kampper skyline, rising on the mast side of Broad Street, between Main and Market Streets.

-Left, an atreat-design, lowprofile office complex as a companion to the high-rise structure, south of the new landmark tower and leading toward the morefamiliar tower on the old reifroad depat, which not only will be saved but made a contempore, along with Church Circle.

—Lower left, residences for elderly, scalped in reflect the conventry circles of Church Clarke, at the north end of Bread Street, to be converted in a large desired converted in a large desired tractures, the elderly housing complex will centain adequate parking garage space for its benants.

-Lower right, to the south of the current city hall, a large public packing facility, to be connected by a larg, tubular "people mover" to the Brand Street shapping mail.





# 1995 Strategic Plan SWOT Analysis

#### **Internal Strengths**

Community volunteerism

Employee strengths—technical knowledge, professionalism

Employee education

Quality parks and recreation programs

Good human resource (personnel) ethics

Good community spirit reflected in city hall

The convention center

Good state representation

Quality public safety programs

#### **Internal Weaknesses**

Financial limitations

Inappropriate staff reductions

Street repair problems

Weak weed and general code enforcement

Overextension of services

Weak state government relations

#### **External Threats**

Loss of Delta and lack of quality American Airline flights

**Retail competition** 

Loss of momentum

BEP school program

Annexation law changes

Downtown eating establishments

Regional job loss

Potential Eastman buy-out

Lack of green space

Riverfront park erosion

Consolidated government

#### **External Opportunities**

An aging population

Convention center

Regionalism

Cement Hill development

Communication plan

Free Trade Zone growth

US 23 completion

Highway marker 56 development

Two corporate headquarters

New/improved transportation corridors

Downtown development

## 1995 Strategic Plan

### City of Kingsport

#### Our mission is making Kingsport the best place to be.

GO.	ΑI	LS:
-----	----	-----

**Goal # 1. Provide Adequate Infrastructure** 

**Goal # 2. Provide for Controlled Growth** 

**Goal # 3. Improve Commitment to Service** 

**Goal # 4. Improve Communications** 

Goal # 5. Improve Employee Development and Job Satisfaction

Goal # 6. Strengthen Economic Development
Opportunities

**Goal #7. Improve the City's Financial Position** 

Goal # 8. Continuously Improve Kingsport's
Quality of Life

**Goal # 9. Improve Administrative Procedures** 

**Goal # 10. Improve Intergovernmental Relations** 

#### **ACTIONS (Excerpts):**

- √ State-mandated Inflow & Infiltration Program
- ✓ Gibson Mill to Stone Drive connector
- ✓ Rebuild Netherland Inn Bridge
- ✓ Focused annexation around MeadowView
- ✓ Develop complaint tracking system
- ✓ Develop a communications & public relations plan
- ✓ Employee pay & classification plan
- ✓ Complete the convention center
- ✓ Extend I-26 designation from NC to VA
- ✓ Achieve an AA bond rating
- ✓ Finish the Greenbelt

### 1997

- What GOVERNMENTAL assumptions constrain or enhance our ability to improve our quality of life?
- What ECONOMIC assumptions constrain or enhance our ability to improve our quality of life?
- What assumptions about the availability of RESOURCES constrain or enhance our ability to improve our quality of life?
- What INFRASTRUCTURE/PHYSICAL PLANT assumptions constrain or enhance our ability to improve our quality of life?
- What DEMOGRAPHIC assumptions constrain or enhance our ability to improve our quality of life?
- What assumptions about SERVICES underpin our definition of quality of life?
- What assumptions about EDUCATION underpin our definition of quality of life?
- What assumptions about ENVIRONMENT underpin our definition of quality of life?
- What OTHER assumptions constrain or enhance our ability to improve our quality of life?

### 1997

7. What assumptions about EDUCATION underpin our definition of quality of life?

### b. Higher Education

\* Need for better access to higher education in Kingsport

\* University Center underutilized

\* Access to 4-year engineering curriculum (chemical, mechanical, civil, industrial)

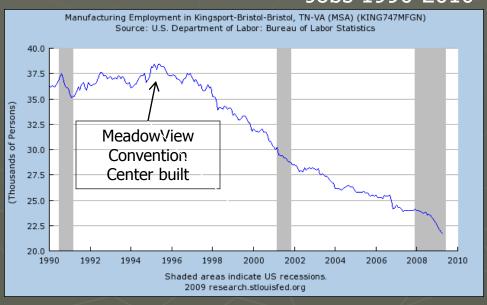
\* Increased post-graduate curriculum (to capture working adult

population)\* Loss of student age population group and, thus, loss of diversity in population

## The 1999 Economic Summit Economy in Transition

- "Last one out, turn out the lights"
- Major manufacturing closures/lay-offs
- Eastman spin-off from Kodak
- Major changes in elected officials
- Major changes in leadership
- A new day, a new plan
- "Rustbelt" city
- Call to action

Kingsport Manufacturing Jobs 1990-2010



# Where We Were The 1999 Economic Summit

Six Major Non-Traditional Economic Development Initiatives

- Higher Education (Educate & Grow)
- Recruit people (educated with income)
  - Retail amenities
  - Accessibility (airport)
  - Quality of life amenities
  - Commitment to education
- •Small business & entrepreneurs
- •Leisure/hospitality/sports tourism
- •Redevelopment / TIF / PILOT
- •Public arts, sculpture, music, cultural amenities



Broad Street Redevelopment Concept Plan 2001

# Where We Were The 1999 Economic Summit

Six Major Non-Traditional Economic Development Initiatives

- Higher Education (Educate & Grow)
- Recruit people (educated with income)
  - Retail amenities
  - Accessibility (airport)
  - Quality of life amenities
  - Commitment to education
- •Small business & entrepreneurs
- Leisure/hospitality/sports tourism
- •Redevelopment / TIF / PILOT
- •Public arts, sculpture, music, cultural amenities



Broad Street Redevelopment Concept Plan 2001





#### 2 years free tuition to H.S. graduates

#### Childcare, Public Transit

\$17 million local capital funding

2,100 students

2002 – Applied Technology

2008 - Health Professions

2009 - Higher Education

2009 - Advanced Manufacturing

2011 – Automotive Tech

#### Kingsport Times-News

### Harvard recognizes city's efforts to spur education

Most residents already consid Kingsport a special place. All t same, it's gratifying that the city h been identified by Harvard Univers as creating some of the most innovati education initiatives in the nation.

This week in Washington, D.C., t Ash Institute for Democratic Gove nance and Innovation at the John Kennedy School of Government Harvard University honored Kingspo as one of only six winners of the 20 Innovations in American Governme Awards.

The prestigious award is a recogn tion from one of the top universities the nation of Kingsport's years of wo in promoting and advancing higher e ucation — from the Educate and Gre program, to the newly open Kingsport Center for Higher Educ tion, to the idea of creating an Ac demic Village in downtown Kingspor

As Mayor Dennis Phillips noted, th incredible accomplishment will "dra



Price 75 Cents

94th Year, Number 271

### Haslam says 'Educate and Grow' could go statewide

■ 'Educate and Grow scholarship program allows ev-





Education a family affair for Church Hill foursome

'As long as you're willing to learn, you will learn here."

Troy Christian

By RICK WAGNER rwagner@timesnews.net

KINGSPORT - When it comes to the Kingsport Center for Higher Education, the Christian family of Church Hill is keeping it all in the family.

Dad Troy Christian, mom Teresa,



and professors and among students.

"They're really here to help us learn," Teresa said of the professors, including her anatomy professor, whom she talked with as he came through a hall at the center during the family's recent interview. "You're about get to know everybody in your classroom by the end of the semester on a personal level."

Of the Christians:

· Troy has worked at Domtar for about four years. About three years

# Where We Were The 1999 Economic Summit

Six Major Non-Traditional Economic Development Initiatives

- Higher Education (Educate & Grow)
- Recruit people (educated with income)
  - Retail amenities
  - Accessibility (airport)
  - Quality of life amenities
  - Commitment to education
- •Small business & entrepreneurs
- Leisure/hospitality/sports tourism
- •Redevelopment / TIF / PILOT
- •Public arts, sculpture, music, cultural amenities

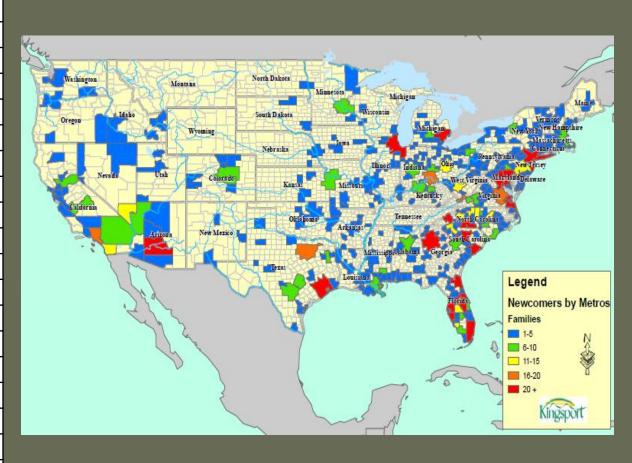


Broad Street Redevelopment Concept Plan 2001

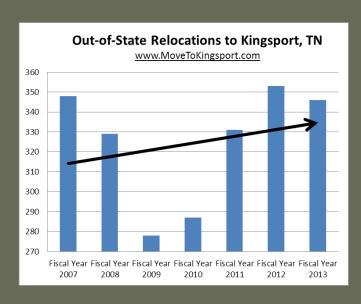
### **Top Metros Moving to Kingsport**

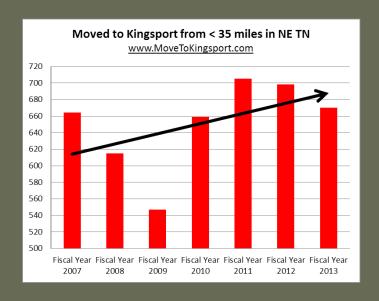
3,251 families relocated from 50 states, DC & the Virgin Islands (2006-2013)

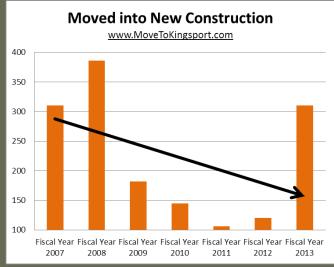
Washington, DC-VA-MD-WV	66
Tampa-St. Pete-Clearwater, FL	62
Chattanooga, TN-GA	56
Atlanta, GA	50
Miami-Ft Lauderdale, FL	50
Asheville, NC	45
Orlando, FL	41
New York, NY-NJ-PA	38
Charlotte, NC-SC	34
Sevierville, TN	34
Chicago, IL-IN-WI	33
Virginia Beach-Norfolk, VA-NC	33
Detroit, MI	29
Columbia, SC	28
Daytona Beach, FL	28
Memphis, TN-MS-AR	28
Phoenix-Mesa-Scottsdale, AZ	27
Baltimore, MD	26
Charleston, SC	26
Houston-Baytown-Sugar Land, TX	26
Dallas-Fort Worth-Arlington, TX	25
Jacksonville, FL	24

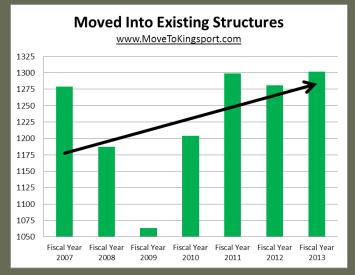


# Move to Kingsport 2013









# Where We Were The 1999 Economic Summit

Six Major Non-Traditional Economic Development Initiatives

- Higher Education (Educate & Grow)
- Recruit people (educated with income)
  - Retail amenities
  - Accessibility (airport)
  - Quality of life amenities
  - Commitment to education
- Small business & entrepreneurs
- •Leisure/hospitality/sports tourism
- •Redevelopment / TIF / PILOT
- •Public arts, sculpture, music, cultural amenities

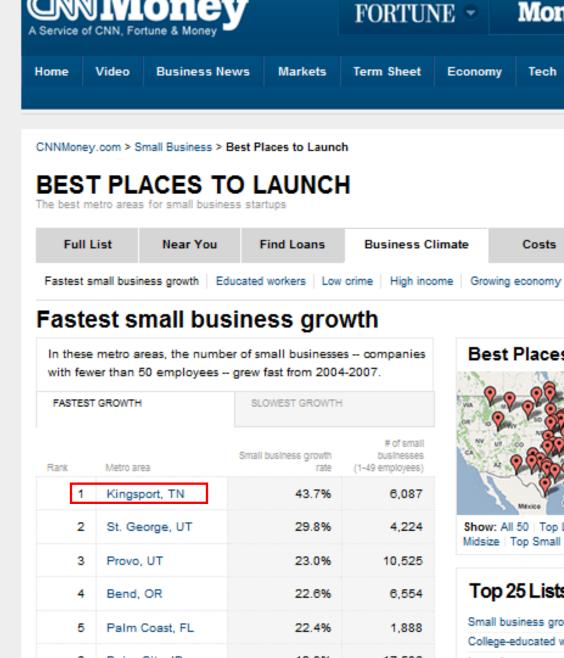


Broad Street Redevelopment Concept Plan 2001



Home About Us Events Partners News Join





# 2009 -Costs **Best Places Winners** North Atlantic Ocean Show: All 50 | Top Large Places | Top Midsize | Top Small Top 25 Lists Small business growth College-educated workers

Money -

Personal Finance

Tech

Economy

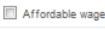


Small Business

#### Find your lau

Do you prefer a place

The factors that mat most to me are:



Educated worker

Low crime

# Where We Were The 1999 Economic Summit

Six Major Non-Traditional Economic Development Initiatives

- Higher Education (Educate & Grow)
- Recruit people (educated with income)
  - Retail amenities
  - Accessibility (airport)
  - Quality of life amenities
  - Commitment to education
- •Small business & entrepreneurs
- Leisure/hospitality/sports tourism
- •Redevelopment / TIF / PILOT
- •Public arts, sculpture, music, cultural amenities



Broad Street Redevelopment Concept Plan 2001



# Where We Were The 1999 Economic Summit

Six Major Non-Traditional Economic Development Initiatives

- Higher Education (Educate & Grow)
- Recruit people (educated with income)
  - Retail amenities
  - Accessibility (airport)
  - Quality of life amenities
  - Commitment to education
- •Small business & entrepreneurs
- •Leisure/hospitality/sports tourism
- Redevelopment / TIF / PILOT
- •Public arts, sculpture, music, cultural amenities



Broad Street Redevelopment Concept Plan 2001







### Since 2005, all of these have located on a redeveloped site











### stir fry cafe

















































### Downtown Kingsport Renaissance

\$114.9 million appraised value

\$41.7 million in private taxable investment (1998-2011)

Excluding churches, hospital, higher education (an additional \$129,000,000)







### 2000

Date Published: October 10, 2000

#### BMA wants Model City to be 'community of choice for the Northeast Tennessee Valley'

KINGSPORT - The Model City is one step closer to "a more focused vision."

"We have to know where we're going," Mayor Jeanette Blazier said.

Kingsport's Vision Action Team met Tuesday to turn ideas and concepts from a Board of Mayor and Aldermen retreat into an answer to the question: "What will Kingsport look like in 20 years?"

The draft, which will be presented at the next BMA work session reads: "A planned regional center for people and business - the community of choice for the Northeast Tennessee Valley."

The committee had a lengthy discussion trying to determine what to call the region. Northeast Tennessee Valley was settled on with the understanding that the committee will continue to pursue other ways to define where Kingsport is.

City Manager Ray Griffin will now be charged with creating explanations of the terms "planned," "regional," "people" and "business."

"If we're going to put this out there, we need to explain it so everyone feels a part of it," Alderman Dave Clark said.

### 2003



- Jeff Fleming's original response (3/19/03):
- Arts, Culture, Heritage, Recreation
- Strategic Objective #2: Kingsport becomes a regional center for arts, culture, heritage, and recreation.
- Action Item #1: King's Port on the Holston
  - Develop an arts/culture/entertainment-based redevelopment plan for the unique asset that is our riverfront. This natural amenity gives Kingsport a distinct advantage because it cannot be replicated regionally.
  - Riverfront Seafood, with its open air patio, window wall, and stadium-seat-dining has drawn attention to the natural beauty in this bend of the Holston – which provides for long views of the river corridor.
- This location is at the confluence of the Holston River and Reedy Creek Greenways, Daniel Boone Wilderness Trail, Head of Navigation for the Great Tennessee Valley, Sacred Cherokee Long Island of the Holston, Heritage Park, Boatyard, etc. Development could be loosely based on Volunteer Landing in Knoxville, Chattanooga Riverfront, and Memphis' Mud Island (with similar state / federal primary funding sources). Ideas might include a HistoryWalk, Riverfront Outfitters (rentals for fishing, roller blades, bicycles, kayaks, canoes, etc.), pedestrian bridge connecting Heritage Park and Riverfront Roundabout, for example.

### 2013-14 Strategy

#### Mission, Vision and Strategy

MISSION: To Provide Economic, Educational and Quality of Life Opportunities that Create a Safe, Vibrant and Diverse Community.

VISION: To Be a Planned Regional Center for People and Business--The Community of Choice for the Northeast Tennessee Valley.

STRATEGY: To Create a healthy Economy by Continuing Efforts to Expand and Diversify the Economic Base.

DESIRED OUTCOME: A successful and Prosperous Community

#### Core Values (CV)

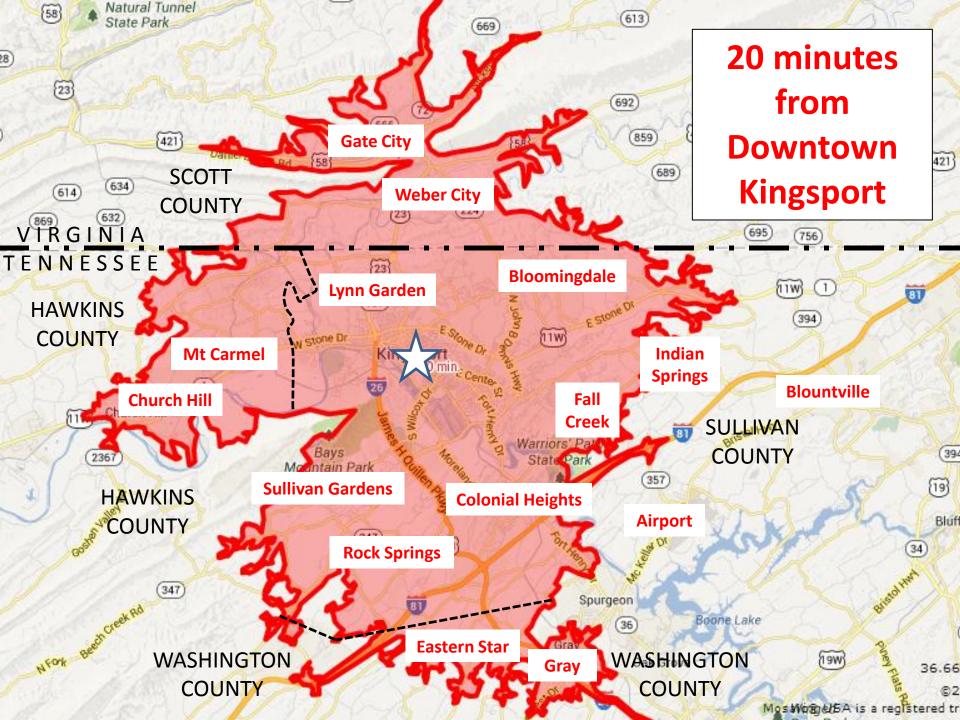
CV1: Value Citizens CV3: Leadership CV5: Excellence CV2: Integrity CV4: Value Employees CV6: Partnerships

Key Success Factors (KSF)									
KSF 1	KSF 2	KSF 3	KSF4	KSF 5	KSF 6	KSF7	KSF 8		
Citizen	Qualified	Economic Growth,	Stewardship	Strong	Reliable	Superior	A		
Friendly	Municipal	Development &	of the	Public	Dependable	Quality of	Safe		
Government	Workforce	Redevelopment	Public Funds	Education	Infrastructure	Life	Community		

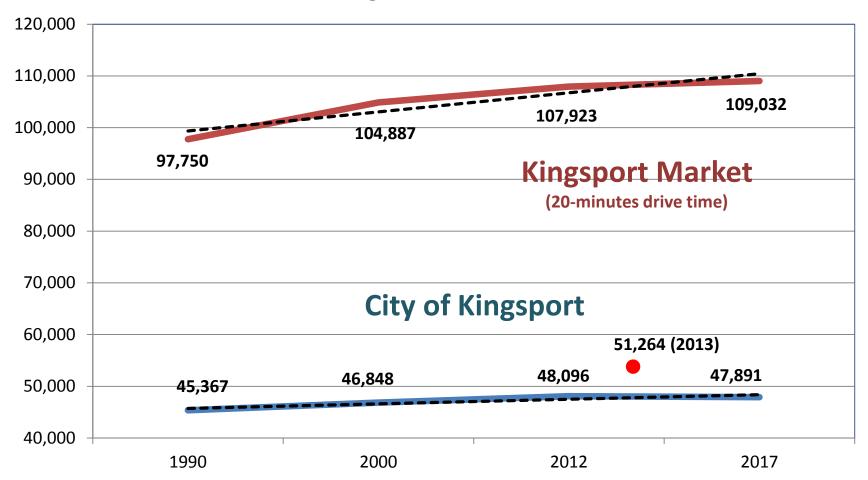
	Key Strategic Objectives (KSO)							
	KSO 1	KSO 2	KSO 3	KSO 4				
-	Economic	Provide	Center for	Center for				
	Development Partnerships	Infrastructure for E.D. Recreation/Heri	Performance Excellence tage	Arts, Culture				

	Balanced ScorecardGlobal Measures									
Measures of Excellence	Customer Perspective	Financial Perspective		Critical Operational		Process Improvement	Internal Growth &			
TN Quality Award Budget Award Audit Award Fire Accreditation Police Accreditation	Courtesy/Professionali	Bond Rating Total Bonded Debt G.O. Debt Capacity Debt Service % Budget General Fund Balance	5-Year CIP Financing Property Tax Rate Assessed Values Sales Tax Receipts Utility Rates	Water Plant Score Audit Opinion	Time Fire Code	Employee Innovation Process Improve. Performance Excellence	Turnover Compensation FTE Training Hours Employee Satisfaction Employee Fairness			

Let's see what the numbers say about our city and how it has changed since 1990.



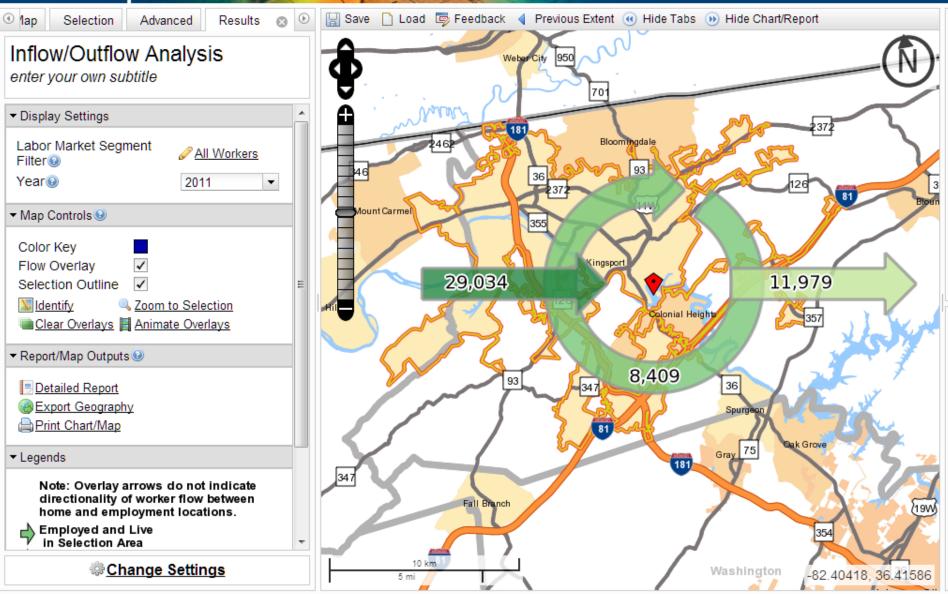
# **Population**



- Market & City population increased <1% per year</li>
- Market grew 11.5% (1990-2017)
- City grew 5.6% (1990-2017)
- Annexation caused city to grow 15.5% (1990-2013)

#### OnTheMap

#### **LEHD Home Hel**



# **Inflow-Outflow Analysis**

Where Residents (Who Are Employed) Live vs. Where They Work

	Inflow	Outflow	Live-Work	Total	% Inflow	%Outflow	%Live-Work
City of Chattanooga	115,820	19,844	44,799	180,463	64.2%	11.0%	24.8%
City of Knoxville	132,247	29,220	41,035	202,502	65.3%	14.4%	20.3%
City of Asheville	59,018	16,875	18,817	94,710	62.3%	17.8%	19.9%
City of Murfreesboro	40,657	27,721	16,700	85,078	47.8%	32.6%	19.6%
City of Roanoke, VA	50,689	23,480	17,875	92,044	55.1%	25.5%	19.4%
City of Johnson City	38,619	11,282	10,829	60,730	63.6%	18.6%	17.8%
City of Kingsport	30,085	12,597	8,695	51,377	58.6%	24.5%	16.9%
City of Cleveland, TN	24,816	10,946	7,284	43,046	57.6%	25.4%	16.9%
City of Cookeville	22,816	4,032	5,378	32,226	70.8%	12.5%	16.7%
City of Bristol, TN	10,540	6,649	3,065	20,254	52.0%	32.8%	15.1%
City of Morristown	24,100	3,854	4,906	32,860	73.3%	11.7%	14.9%
City of Bristol, VA	10,370	4,116	2,343	16,829	61.6%	24.5%	13.9%
City of Oak Ridge	27,355	6,220	5,353	38,928	70.3%	16.0%	13.8%
City of Greeneville	15,845	3,350	2,831	22,026	71.9%	15.2%	12.9%
City of Maryville	17,818	8,408	3,122	29,348	60.7%	28.6%	10.6%
City of Elizabethton	8,405	3,577	1,356	13,338	63.0%	26.8%	10.2%
City of Abingdon	8,020	2,036	930	10,986	73.0%	18.5%	8.5%
City of Gate City, VA	1,814	557	156	2,527	71.8%	22.0%	6.2%
City of Church Hill	1,447	3,776	198	5,421	26.7%	69.7%	3.7%
City of Alcoa	14,028	2,626	477	17,131	81.9%	15.3%	2.8%
City of Weber City, VA	760	403	26	1,189	63.9%	33.9%	2.2%
City of Mount Carmel	167	1,941	15	2,123	7.9%	91.4%	0.7%

# **Daytime Population**

2006-2010 American Community Survey Sampling of Tennessee Cities

	Total resident population	Estimated daytime population
Murfreesboro city	102,602	107,161
Johnson City city	61,758	87,481
Jackson city	64,418	87,139
Franklin city	59,905	79,225
Kingsport city	47,852	70,799
Cleveland city	40,507	56,165
Oak Ridge city	28,925	47,954
Cookeville city	29,722	47,361
Morristown city	28,749	44,766
Maryville city	26,925	34,275
Bristol city (TN)	26,427	31,639
Greeneville town	15,189	27,688
Sevierville city	14,477	24,256
Elizabethton city	14,306	17,033
Alcoa city	8,473	16,176
Erwin town	6,090	8,356
Bloomingdale CDP	9,742	6,945
Jonesborough town	4,875	5,859
Church Hill city	6,630	5,755
Colonial Heights CDP	7,274	4,774
Mount Carmel town	5,349	3,327

### Population Growth Comparison (42 cities)

	1990	2000	2012	2017	
Murfreesboro, TN	93,422	138,367	203,364	223,490	139.2%
Chapel Hill, NC	125,173	167,032	207,764	222,485	77.7%
Crossville, TN	26,552	35,668	43,285	45,623	71.8%
Hendersonville, NC	66,289	84,568	103,515	109,334	64.9%
Cookeville, TN	50,996	62,327	74,278	77,689	52.3%
Maryville, TN	72,573	87,524	102,077	106,478	46.7%
Greensboro, NC	237,594	283,768	330,526	345,487	45.4%
Charlottesville, VA	87,113	102,552	119,846	124,789	43.2%
Cleveland, TN	71,645	85,801	97,574	101,139	41.2%
Lexington, KY	224,075	256,077	299,911	314,852	40.5%
Asheville, NC	147,090	169,211	190,020	206,479	40.4%
Greenville, SC	261,232	295,553	341,152	354,000	35.5%
Oak Ridge, TN	67,210	74,760	86,019	89,577	33.3%
Hickory, NC	111,743	128,328	139,580	143,557	28.5%
Johnson City, TN	115,703	129,439	144,096	148,607	28.4%
Huntsville, AL	178,237	184,263	213,165	221,560	24.3%
Columbus, IN	64,216	72,013	77,908	79,678	24.1%
Staunton, VA	68,150	74,213	80,705	83,335	22.3%
Spartanburg, SC	143,057	151,255	167,001	172,525	20.6%
Nashville, TN	428,547	465,227	503,516	513,398	19.8%
Knoxville, TN	257,091	275,644	300,437	307,659	19.7%
Kingsport, TN	97,750	104,887	107,923	109,032	11.5%
Monroe, MI	90,595	95,349	97,524	99,615	10.0%
Florence, AL	83,602	86,657	90,507	91,742	9.7%
Roanoke, VA	192,753	200,485	207,884	210,270	9.1%
Bristol, TN-VA	82,786	85,565	88,444	89,678	8.3%
Augusta, GA	210,561	217,313	224,439	227,531	8.1%
Sumter, SC	83,916	84,220	88,057	90,555	7.9%
Charleston, SC	227,295	224,130	237,744	243,626	7.2%
Chattanooga, TN	207,769	208,141	219,082	221,323	6.5%
Kent, OH	296,999	306,180	307,739	311,601	4.9%
Davenport, IA	248,306	254,218	257,639	260,053	4.7%
Monroe, LA	124,203	125,862	128,312	129,424	4.2%
Columbus, GA	195,566	197,729	198,492	201,901	3.2%
Springfield, MA	445,374	440,818	449,540	451,884	1.5%
Mansfield, OH	105,594	107,855	102,698	102,485	-2.9%
Scranton, PA	205,563	199,316	199,101	199,152	-3.1%
Huntington, WV	126,633	125,214	122,908	122,145	-3.5%
Binghamton, NY	159,302	148,788	149,211	149,221	-6.3%
Cincinnati, OH					
	757,213	730,492	688,272	682,851	-9.8%
Charleston, WV	757,213 145,184	730,492 138,500	688,272 132,352	682,851 130,613	-9.8% -10.0%
•	•	•	•	·	

# **Population Growth Comparison**

Market Area (20-Minute Drive Time)

	1990	2000	2012	2017	
Murfreesboro, TN	93,422	138,367	203,364	223,490	139.2%
Chapel Hill, NC	125,173	167,032	207,764	222,485	77.7%
Crossville, TN	26,552	35,668	43,285	45,623	71.8%
Hendersonville, NC	66,289	84,568	103,515	109,334	64.9%
Cookeville, TN	50,996	62,327	74,278	77,689	52.3%
Maryville, TN	72,573	87,524	102,077	106,478	46.7%
Greensboro, NC	237,594	283,768	330,526	345,487	45.4%
Charlottesville, VA	87,113	102,552	119,846	124,789	43.2%
Cleveland, TN	71,645	85,801	97,574	101,139	41.2%
Lexington, KY	224,075	256,077	299,911	314,852	40.5%
Asheville, NC	147,090	169,211	190,020	206,479	40.4%
Greenville, SC	261,232	295,553	341,152	354,000	35.5%
Oak Ridge, TN	67,210	74,760	86,019	89,577	33.3%
Hickory, NC	111,743	128,328	139,580	143,557	28.5%
Johnson City, TN	115,703	129,439	144,096	148,607	28.4%
Huntsville, AL	178,237	184,263	213,165	221,560	24.3%
Columbus, IN	64,216	72,013	77,908	79,678	24.1%
Staunton, VA	68,150	74,213	80,705	83,335	22.3%
Spartanburg, SC	143,057	151,255	167,001	172,525	20.6%
Nashville, TN	428,547	465,227	503,516	513,398	19.8%
Knoxville, TN	257,091	275,644	300,437	307,659	19.7%
Kingsport, TN	97,750	104,887	107,923	109,032	11.5%
Monroe, MI	90,595	95,349	97,524	99,615	10.0%
Florence, AL	83,602	86,657	90,507	91,742	9.7%

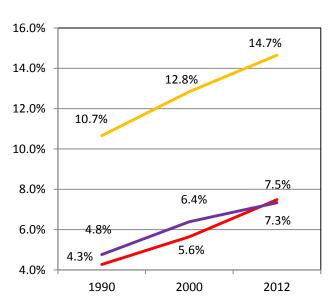
## **Population Growth Comparison**

### Market Area (20-Minute Drive Time)

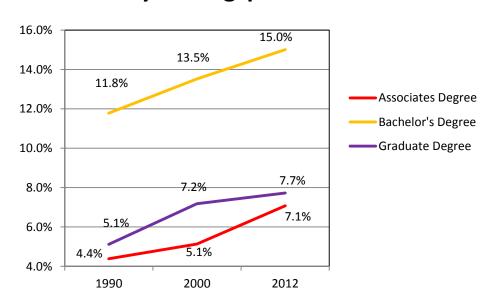
Nashville, TN	428,547	465,227	503,516	513,398	19.8%
Knoxville, TN	257,091	275,644	300,437	307,659	19.7%
Kingsport, TN	97,750	104,887	107,923	109,032	11.5%
Monroe, MI	90,595	95,349	97,524	99,615	10.0%
Florence, AL	83,602	86,657	90,507	91,742	9.7%
Roanoke, VA	192,753	200,485	207,884	210,270	9.1%
Bristol, TN-VA	82,786	85,565	88,444	89,678	8.3%
Augusta, GA	210,561	217,313	224,439	227,531	8.1%
Sumter, SC	83,916	84,220	88,057	90,555	7.9%
Charleston, SC	227,295	224,130	237,744	243,626	7.2%
Chattanooga, TN	207,769	208,141	219,082	221,323	6.5%
Kent, OH	296,999	306,180	307,739	311,601	4.9%
Davenport, IA	248,306	254,218	257,639	260,053	4.7%
Monroe, LA	124,203	125,862	128,312	129,424	4.2%
Columbus, GA	195,566	197,729	198,492	201,901	3.2%
Springfield, MA	445,374	440,818	449,540	451,884	1.5%
Mansfield, OH	105,594	107,855	102,698	102,485	-2.9%
Scranton, PA	205,563	199,316	199,101	199,152	-3.1%
Huntington, WV	126,633	125,214	122,908	122,145	-3.5%
Binghamton, NY	159,302	148,788	149,211	149,221	-6.3%
Cincinnati, OH	757,213	730,492	688,272	682,851	-9.8%
Charleston, WV	145,184	138,500	132,352	130,613	-10.0%
Pittsburgh, PA	844,869	792,932	741,742	733,916	-13.1%
Youngstown, OH	302,968	289,218	262,778	259,566	-14.3%

### **Educational Attainment**

#### **20-minutes Drive Time**



#### **City of Kingsport**



#### Conclusion:

-City has higher % bachelor's & graduate degrees than Market, but Market improved more

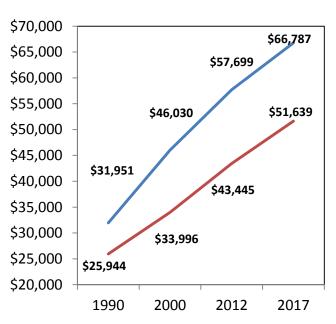
-Associate's degrees increased: Market 3.0% City 2.7%

-Bachelor's degrees increased: Market 4.0% City 3.2%

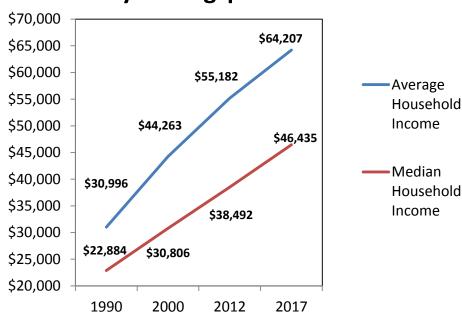
-Graduate degrees increased: Market 2.7% City 2.6%

### Income

#### **20-Minutes Drive Time**



#### **City of Kingsport**



#### Conclusion:

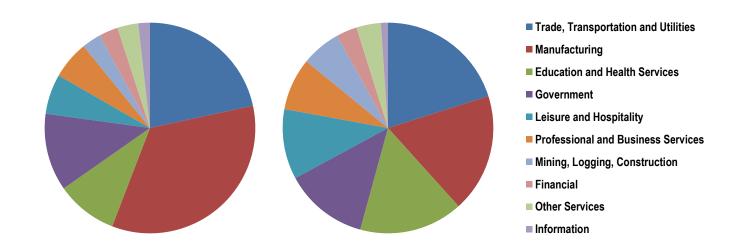
- -Market median income is 11.2% higher than city
- -Market median income grew 99% (almost doubled)
- -City median income grew 103% (more than doubled)

# **Employment**

Employment in Kingsport, TN-VA MSA	Jan 1990	% of All Jobs	August 2013	% of All Jobs	Change (1990-Aug 2013)
Trade, Transportation and Utilities	22,900	21.6%	24,100	20.1%	1,200
Manufacturing	36,300	34.2%	21,800	18.2%	-14,500
Education and Health Services	10,000	9.4%	19,100	15.9%	9,100
Government	12,600	11.9%	15,400	12.9%	2,800
Leisure and Hospitality	6,500	6.1%	12,900	10.8%	6,400
Professional and Business Services	6,200	5.8%	9,600	8.0%	3,400
Mining, Logging, Construction	3,100	2.9%	7,300	6.1%	4,200
Financial	3,100	2.9%	3,800	3.2%	700
Other Services	3,400	3.2%	4,500	3.8%	1,100
Information	1,900	1.8%	1,300	1.1%	-600
TOTAL	106,000	100.00%	119,800	100.00%	13,800

TOTAL 106,000 | 100.00% | 119,800 | 100.00% | 43,800 | <= Net New Jobs | Source: http://www.bls.gov/eag/eag.tn\_kingsport\_msa.htm

1-Oct-13



# **Unemployment Rate**

Green =	Positive Ye	llow = Within	1% +/-	Red = Negative	
CITY OF KINGSPORT	2008	2012	2013	Change (5 years)	Change (1 year)
Unemployment Rate	7.6%	8.2%	7.8%	0.2%	-0.4%
Population	47,356	50,851	51,264	8.3%	0.8%
Labor Force	19,280	20,830	20,690	7.3%	-0.7%
Employed	17,820	19,130	19,070	7.0%	-0.3%
Unemployed	1,460	1,700	1,620	11.0%	-5.5%

Unemployment (sorted low to high)	2008	2012	2013	Change (5 years)	Change (1 year)
Bristol (TN), City of	6.2%	7.5%	7.4%	1.2%	-0.1%
Carter County	6.7%	8.4%	8.6%	1.9%	0.2%
Cleveland, City of	9.4%	9.5%	8.5%	-0.9%	-1.0%
Greene County	9.2%	11.6%	11.1%	1.9%	-0.5%
Hawkins County	7.3%	8.1%	8.1%	0.8%	0.0%
Johnson City MSA	6.1%	7.9%	8.0%	1.9%	0.1%
Johnson City, City of	6.0%	7.5%	7.8%	1.8%	0.3%
Johnson City-Kingsport-Bristol CSA	6.1%	7.9%	7.7%	1.6%	-0.2%
Kingsport-Bristol MSA	6.0%	7.9%	7.6%	1.6%	-0.3%
Maryville, City of	11.1%	7.2%	7.6%	-3.5%	0.4%
Morristown, City of	10.4%	11.1%	9.6%	-0.8%	-1.5%
Oak Ridge, City of	5.2%	8.2%	7.5%	2.3%	-0.7%
Sullivan County	5.5%	7.7%	7.1%	1.6%	-0.6%
Tennessee, State of	6.1%	8.8%	8.3%	2.2%	-0.5%
U.S. unemployment	6.1%	8.6%	7.3%	1.2%	-1.3%
Washington County	5.7%	7.4%	7.7%	2.0%	0.3%

Green = Positive

Yellow = Within 1% +/-

Red = Negative

# Retail Sales

	Bristol, TN-VA	Johnson City, TN	Kingsport, TN
Census Population (2008)*	43,241	61,990	44,473
Retail Sales (2008)**	\$1,108,300,000	\$1,783,600,000	\$1,327,200,000
Retail Sales per Capita (2008)	\$25,631	\$28,772	\$29,843
Retail Sales per Capita (1999)***	\$18,800	\$22,500	\$21,750
Change in Retail Sales per Capita 1999-2008	36.3%	27.9%	37.2%
% of Total Tri-Cities Retail Sales (2008)	26.3%	42.3%	31.4%

	Bristol, TN-VA	Johnson City, TN	Kingsport, TN
Census Population (2011)*	44,553	63,815	49,232
Retail Sales (2011)**	\$1,014,500,000	\$1,888,200,000	\$1,456,000,000
Retail Sales per Capita (2011)	\$22,771	\$29,589	\$29,574
Retail Sales per Capita (1999)***	\$18,800	\$22,500	\$21,750
Change in Retail Sales per Capita 1999-2011	21.1%	31.5%	36.0%
% of Total Tri-Cities Retail Sales (2011)	24.0%	44.8%	34.5%

	Bristol, TN-VA	Johnson City, TN	Kingsport, TN
Census Population (2011)*	44,553	63,815	49,232
Retail Sales (2012)**	\$1,088,000,000	\$1,910,300,000	\$1,491,200,000
Retail Sales per Capita (2012)	\$24,420	\$29,935	\$30,289
Retail Sales per Capita (1999)***	\$18,800	\$22,500	\$21,750
<b>Change in Retail Sales per Capita 1999-2012</b>	29.9%	33.0%	39.3%
% of Total Tri-Cities Retail Sales (2012)	25.8%	45.3%	35.3%

<sup>\*</sup>U.S. Census Population Estimates

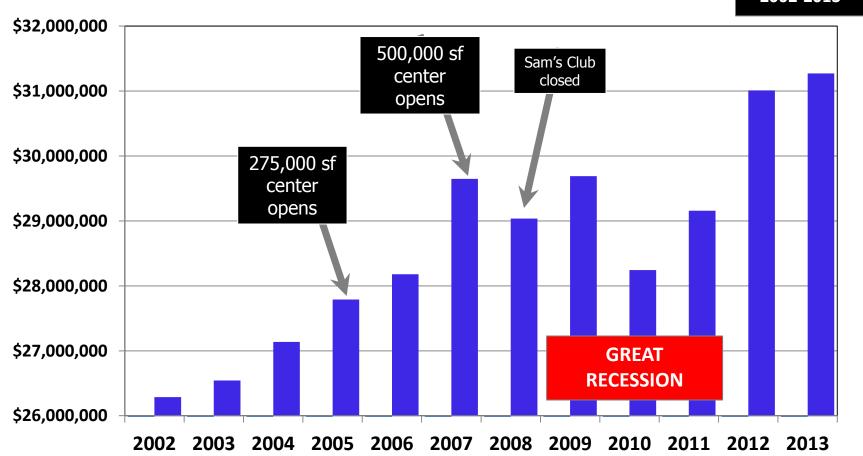
<sup>\*\*</sup>ETSU Retail Report

<sup>\*\*\*</sup>Economic Research Associates report to Economic Summit 1999

### **Retail Sales Tax Collections**

Kingsport, Tennessee by Fiscal Year

19% INCREASE 2002-2013



Who lives in Kingsport? Who's moving here?

# Who lives in Kingsport? 2013 Constitutes 54% of total population



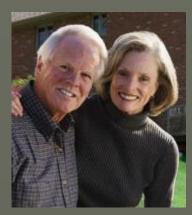
**Town Elders 9.4%** 



True Grit 7.6%



Small Town,
Shallow Pockets
7.5%



Unspoiled Splendor 4.8%



Red, White & Bluegrass 4.5%



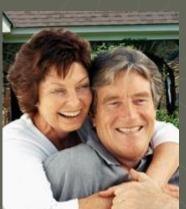
Aging of Aquarius
4.4%



Aging in Place 4.1%



Diapers and Debit Cards 3.8%



Settled and Sensible 3.8%



No Place Like Home 3.7%

# Who's moving to Kingsport from >35 miles away? 2006-2013 Constitutes 62% of all movers from >35 miles away



Small Town, Shallow Pockets 12.9%



**Town Elders 8.8%** 



True Grit 6.9%



Aging of Aquarius 5.3%



Enduring Hardships 5.3%



Aging in Place 5.2%



Dare to Dream 4.8%



Picture Perfect Families 4.7%



Diapers and Debit Cards 4.1%



Sports Utility Families 3.97%

# Who's moving to Kingsport from <35 miles away? 2006-2013 Constitutes 67% of all movers from >35 miles away



Small Town,
Shallow Pockets
17.6%



Town Elders 13.4%



True Grit 9.8%



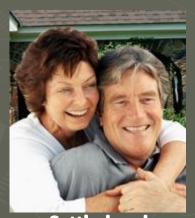
**Enduring Hardships 5.6%** 



Diapers and Debit Cards 4.8%



Aging in Place 4.2%



Settled and Sensible 3.4%



Aging of Aquarius 2.9%



Dare to Dream 2.8%



Digital Dependents 2.5%

## Which mover groups differ?

19% of total moving from >35 miles



Enduring Hardships 5.3%



Dare to Dream 4.8%



Sports Utility Families 3.97%



11% of total moving from <35 miles



Enduring Hardships 5.6%



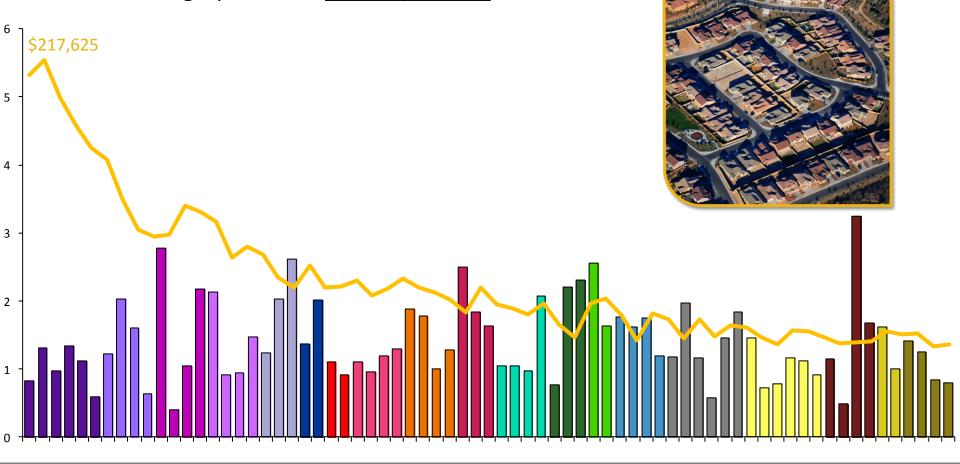
**Digital Dependents 2.5%** 



Dare to Dream 2.8%

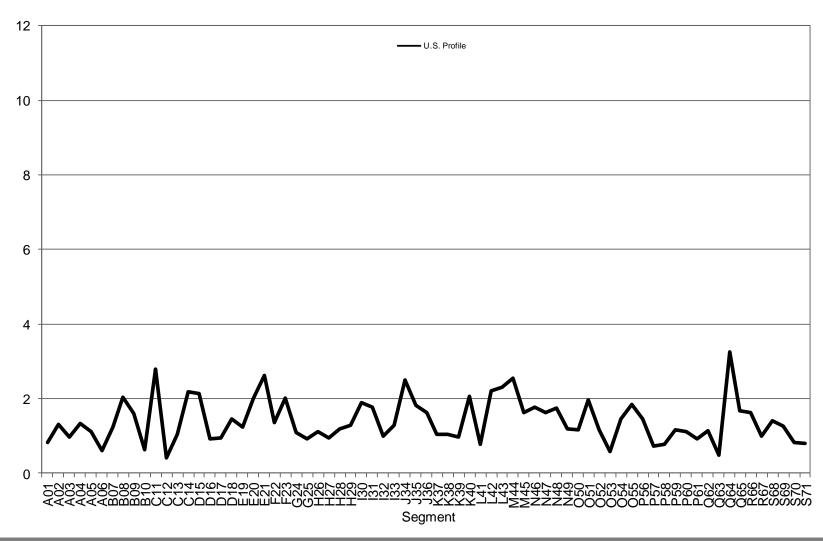
## Segmentation

 All U.S. households are grouped into types based on demographics and <u>psychographics</u>

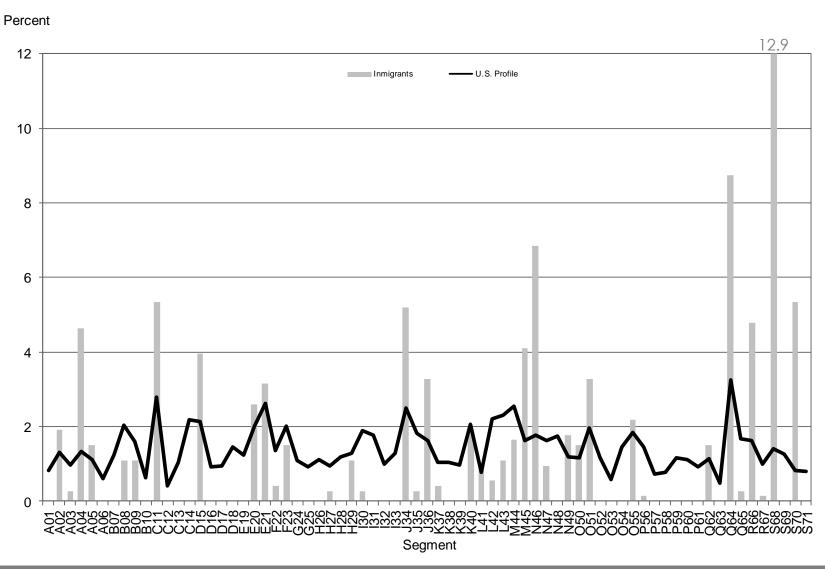


### U.S. Profile



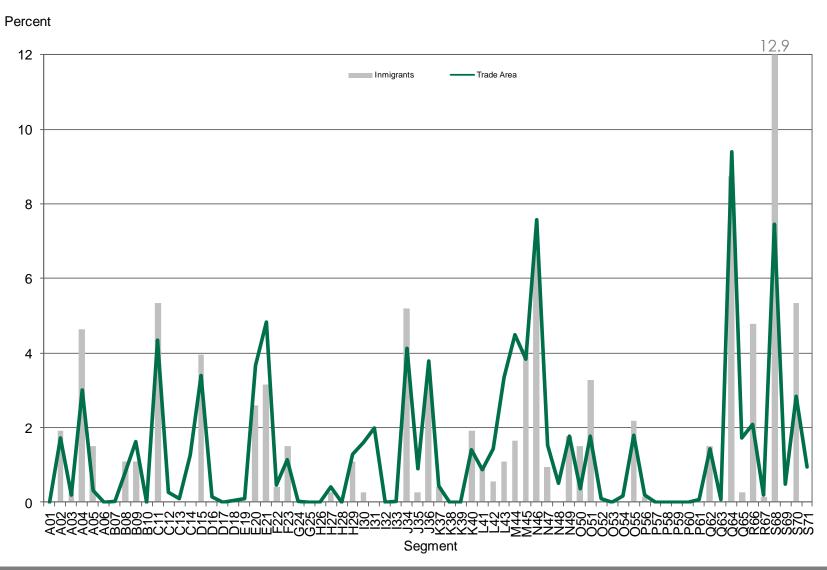


### Actual Movers vs. U.S. Profile





#### Actual Movers vs. Trade Area



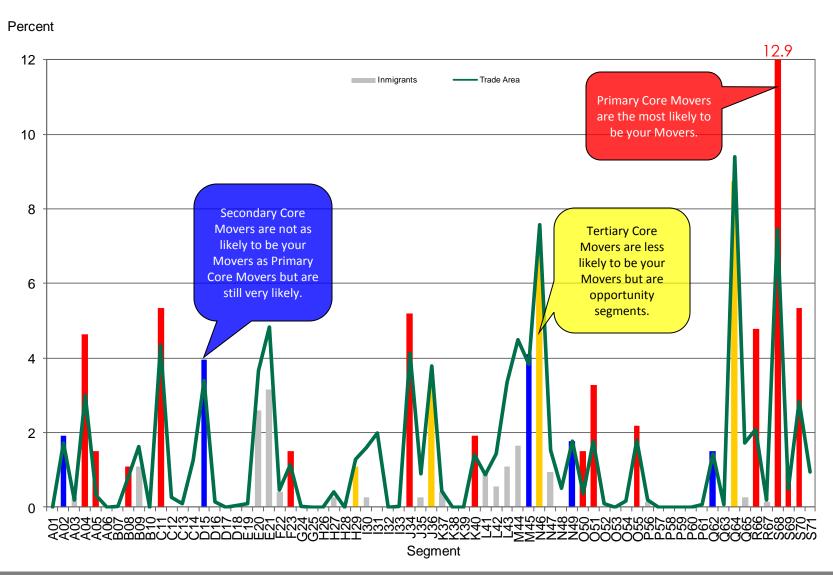


#### Core Mover Selection

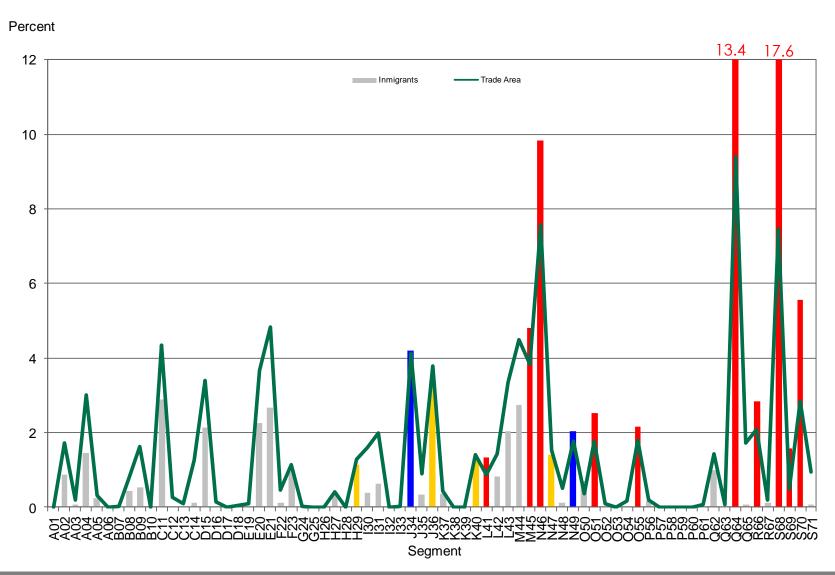
To be a core Mover, a segment must comprise at least 1% of the Mover base. Core Movers are then differentiated as follows:

- Primary Core Movers have a high likelihood of being Kingsport Movers.
- Secondary Core Movers are likely to be Kingsport Movers.
- **Tertiary Core Movers** are less likely to be Kingsport Movers but should be considered opportunity segments that could be targeted to expand the Mover base.

#### Core Movers: Greater than 35 Miles



#### Core Movers: Less than 35 Miles



# Core Mover Comparison

Commont.	Greater than	Less than
Segment	35 Miles	35 Miles
A02: Platinum Prosperity	•	
A04: Picture Perfect Families	•	
A05: Couples with Clout	•	
B08: Babies and Bliss	•	
C11: Aging of Aquarius	•	
D15: Sports Utility Families	•	
F23: Families Matter Most	•	
H29: Destination Recreation	<u>.</u>	•
J34: Aging in Place	•	•
J36: Settled and Sensible		•
K40: Bohemian Groove	•	•
L41: Booming and Consuming		•
M45: Diapers and Debit Cards	•	•
N46: True Grit Americans		•
N47: Countrified Pragmatics		•
N49: Work Hard, Pray Hard	•	•
O50: Full Steam Ahead	•	
O51: Digital Dependents	•	•
O55: Family Troopers	•	•
Q62: Reaping Rewards	•	
Q64: Town Elders	•	•
R66: Dare to Dream	•	•
S68: Small Town Shallow Pockets	•	•
S69: Soul Survivors	•	•
S70: Enduring Hardships	•	•



### Mover Segmentation User Guide

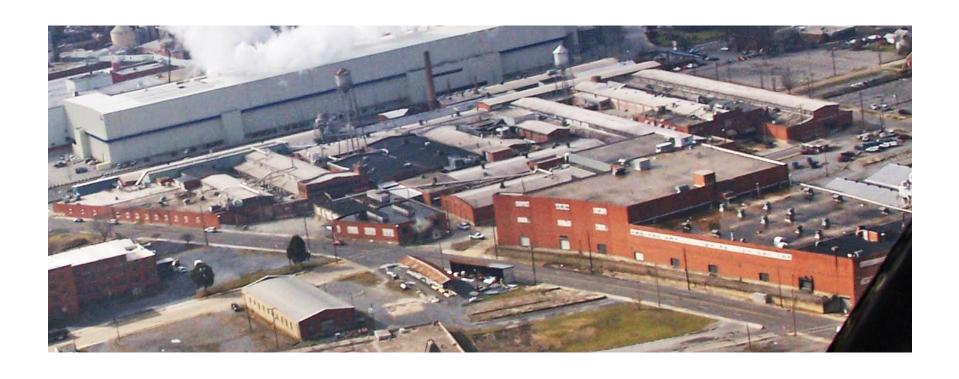


Link to Buxton Mosaic Guide Online



Adapting to Unexpected Opportunities

# Before - a daunting task





## **After**

#### Fast Forward to 2012

- Today's Kingsport Press site is no longer a blighted, urban brownfield. It has been morphed into a hub of downtown activity designed to implement the goals of the 1999 Economic Summit.
- > 2,500 students gather at the Academic Village and it's latest addition, ETSU Downtown
- Nearly every educator in Kingsport visits the Schools Administrative Support Center for training, decision-making, and meeting.
- Newcomers and visitors come to the Chamber offices as a first point of impression.
- Doctors, nurses, and medical workers see nearly 70,000 visitors per year at The Press Building.
- City leaders regularly gather at the Chamber of Commerce to dream, plan and work towards a better future for Kingsport.
- Shoppers frequent the grocery, pharmacy, bakery and fuel center at Food City.
- Diners congregate at restaurants and shoppers visit the Farmer's Market for fresh, local produce that sustains the livelihood of small family farms.
- Small business owners (and those who would like to be) come to the Kingsport Office of Small Business & Entrepreneurship for classes and coaching on planning, financing and growing a small business.
- On the horizon is the Kingsport Carousel, the pinnacle of public art, sculpture and volunteerism.

## Redefining yourself...

- PITTSBURGH The city that once defined rust belt decay might show the rest of the nation how to weather a recession.
- When steel and heavy manufacturing vanished a quarter-century ago, Pittsburgh lost 200,000 jobs in three years. Hulks of deserted mills, their furnaces dead-cold, glowered from the banks of the city's three rivers like the eerie stone faces on Easter Island. Young people fled, turning the town's fabled black-and-gold color scheme to gray.
- Fast-forward 25 years. As most of the nation reels in debt and despair, Pittsburgh is on the move.
- Its air and water are clean, and its waterfront is lined with bike trails and entertainment complexes. Six Fortune 500 firms hang their hats here. Carnegie Mellon University serves as a magnet for some of the world's best and brainiest young people.
- A downtown cultural district boasts 14 blocks of theaters, restaurants and galleries. Foreclosures declined 20 percent compared with a year ago, and home prices are steady.
- Last year, Places Rated Almanac named Pittsburgh America's most livable city. Forbes magazine included it among the world's 10 cleanest cities. Kiplinger's Personal Finance rated Pittsburgh among the 10 smartest cities to live and work in. An affiliate of the Financial Times called it one of North America's top three cities of the future.

- Population
  - Market grew 11.5% (1990-2017)
  - City grew 5.6% (1990-2017)
  - Annexation caused city to grow 15.5% (1990-2013)
  - 30,085 commuters flow into Kingsport each day for work
  - 12,597 Kingsport residents leave to work elsewhere
  - Kingsport grew faster than Roanoke, Chattanooga and Charleston (SC)
  - Kingsport grew slower than Asheville & Hendersonville, NC and Greenville & Spartanburg, SC

#### Educational Attainment

City has higher % bachelor's & graduate degrees than Market

Associate's degrees increased: Market 3.0% City 2.7%

Bachelor's degrees increased: Market 4.0% City 3.2%

Graduate degrees increased: Market 2.7% City 2.6%

#### Retail Sales

- Since 1999, retail sales per capita increased faster than any other market in the Tri-Cities
- Since 1999, Kingsport's market share of Tri-Cities retail sales have increased from 31.4% to 35.3%

#### Income

- Market median income is 11.2% higher than city
- Market median income grew 99% (almost doubled)
- City median income grew 103% (more than doubled)

#### Employment

- In 1990, manufacturing was the largest employment sector with 34.2% of the workforce
- In 1990, the top 2 employment sectors represented 55.8% of the workforce (all eggs in one basket)
- In 2013, employment is more evenly balanced with 5 of 10 sectors in double digits
- Lost 14,500 manufacturing jobs, but had more than 13,800 net jobs added since 1990
- Regional unemployment is consistently among the lowest in Tennessee, especially during downturns

- Of the top 10 market segments moving from >35 miles away
  - 39.1% retirees/pre-retirees
  - 12.8% families
  - 5.3% single parents
  - 4.8% young singles
- Of the top 10 market segments moving from <35 miles away</li>
  - 51.3% are retirees/pre-retirees
  - 5.6% single parents
  - 5.3% young singles
  - 4.8% families

# Now let's go back...your thoughts?

- Focus on the big picture
  - Progress should measured in quarter centuries, not quarters
- Good to great
  - Kingsport has already accomplished many good things, what would make our city great?
- Not too hot, not too cold, just right
  - What is the ideal size of a city?
  - At what point is our city the "right size"?
  - What can we reasonably do to influence growth (or not)?
- Great neighborhoods, smart growth
  - How do you define "smart growth"? Sustainability? Redevelopment?
  - How do we become the preferred city of the region?

